

**Reissue Non IRA to Beneficiary Distribution Form
Substitute IRS W-4P & W-9**

This form is being provided to formally complete your request to change the distribution payee information. After reviewing the information on this form, complete sections A, B and C then sign your request below under section D.

Please mail this form, with your check marked VOID, to the address located on the face of the check.

A. Decedent's Information:

Name (First, M.I., Last) _____ - _____ - _____
Social Security Number Check # received

Marital Status: ☐ Single ☐ Married: Spouse's name _____

B. Beneficiary Information: Beneficiary %: _____ State of Residence: _____

Name (First, M.I., Last) ____/____/____
Date of Birth Social Security Number

Street Address (Physical Address) APT # City State ZIP

C. ELECTION – I elect to receive a distribution as follows:

Spousal Beneficiary ONLY:

- ☐ Issue a check in my name.
- ☐ Issue a check payable to my IRA, qualified retirement plan, 403(a), 403(b), or 457 plan as follows:

Non-spousal Beneficiary:

- ☐ Issue a check in my name.
- ☐ Issue a check payable to my §408(d)(3)(c) Inherited IRA as follows:

D. SIGNATURE - I am a beneficiary authorized to receive this distribution. I understand that I will not receive IRS Form 1099-R. If I have any questions regarding my tax consequences, I will consult with my financial advisor or tax professional prior to cashing this check to determine the appropriate tax treatment for my particular situation. I hereby affirm that the information given is true and correct, and authorize SS&C GIDS, Inc. to make the distribution according to the instructions on this form.

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct social security number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien).

You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Signature of Beneficiary

Printed Name

Date